Demo - SERP - Digital Office

Preparation

1. Import provided Demo Data
2. Login with:
   Standard ID: sample@hansaworld.com
   Password: Sample99

Script

Welcome to this short presentation about Standard ERPs Digital Office.

Any organisation, in any industry, can benefit from Standard ERPs Digital Office.

Digital Office integrates Standard ERP features such as Calendar, Email, Conferences, Business Alerts, Document Management, Task Manager and Workflow Overview in one easy to use module.

Here we will demonstrate how easy it is to use Standard ERPs Digital Office when you receive a new sales enquiry. The Workflow Overview in Standard ERP is a must have feature for any salesperson. It outlines all opportunities in a single window, giving the salesperson an instant overview of all opportunities.

Let's start as Samuel who works as a sales person…

> **ACTION:** User SJ login to the client and open Workflow Overwiev. Period 2019-2020

As we can see here, all the opportunities are classified based on the stage of the opportunity. We are able to see the potential value of all the Sales " Leads", "Prospects", "Quotations", and even those "On Ice".

> **ACTION:** In the View field enter 'SALES' (if not defaulted), select SJ as a person then show the column headings with cursor

These headings are configurable to the meet the requirement of the company environment.
Lets look at the "Quoted" column. Here are some quotes that need our attention today, as indicated by the green icon.

> **ACTION:** Move cursor to indicate the green icon under the Quotations Column (the date of the activity connected with the quote need to be adjusted to the day of presemntation to be green)

Let's take a look at the first quote. We can see here from the Link Manager that this quote was emailed to the customer a few days ago and we can click on the link to go to our mailbox, read the mail and then check to see if there is any new mail.

We see that we have received a new email.

After reading the email we can see that the customer wishes to be contacted the following day at 11.00 AM. From the email we can create a new Workflow Activity for the call.

As you can see the header is already filled-in from the email.
We simply add in the details for the following day and add to calendar.
As this is a request for musical instruments we would like to add Audrey to the call, who is our expert in this area.
By viewing the multi-user Calendar we can check if Audrey is free at 11AM tomorrow. And as we see here, she is available, so we go back to the Activity Record and CC AM.
Audrey will now see this meeting in her calendar.

We can also add reminders for this activity, and get notifications via SMS, pop up message or email. We can also add our customer Limerick Music school ,to the activity record.

The following day we receive a Business Alert via SMS about the call to the customer. We can easily find our activity from the Workflow Overview and open it.
They want to purchase 10 guitars, 5 pianos and 1 drum set.
Directly from the Workflow Overview LEAD column we can open our activity and create a new quotation with Company name and other fields already compoleted.

We can quickly create the quotation and add the 20% discount this customer requested. We send this quote to Leila, the Sales Manager, as this quote requires her approval.

Leila then opens her mailbox and finds an auto generated business alert.
After reviewing the linked quotation Leila approves the discount and the quotation can now be automatically sent to the customer.

Since the customer was happy with our offer we receive an order confirmation - the signed quote - via email. The company has a policy to keep track of all confirmed orders and we can make use of our conferences feature in Standard ERP and save this signed quote to the Confirmed Orders conference. Here, Samuel and his colleagues (who have access) can easily find all signed quotations from customers.

Samuel can now continue with other leads.

We can send out delivery alerts to the customer when the order is ready to be delivered.

In addition to the Sales pipeline overview Digital Office can be used to manage multiple workflows such as project management, marketing campaigns, real estate…..the possibilities are endless.

We have shown you how easy it is to have full control over your business with the functionality that Standard ERP - Digital Office has to offer.

If you would like to know more, please contact your local HansaWorld office today.